City of Maple Valley

Resident Profile

Executive Summary

February 21, 2012

Maple Valley City Council Meeting

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Research Goal and Objectives

Research Goal
Hebert Research conducted secondary research in order to build a demographic profile of Maple Valley residents and model current and future trends in the makeup of the City's population.

Research Objectives
The following are the specific objectives accomplished in the research:

1. Provided essential information on current Maple Valley demographics.

2. Identified the most prominent geo-demographic market segments within Maple Valley.

3. Evaluated trends of demographic change in Maple Valley's recent history.

4. Forecasted demographic changes over time.

5. Analyzed retail economic leakage in Maple Valley and surrounding communities.

Research Methodology

Hebert Research conducted secondary research using three main sources to compile the data and information used in this study:

- U.S. Census Bureau
- Nielsen Claritas, Inc.
- National Center for Health Statistics

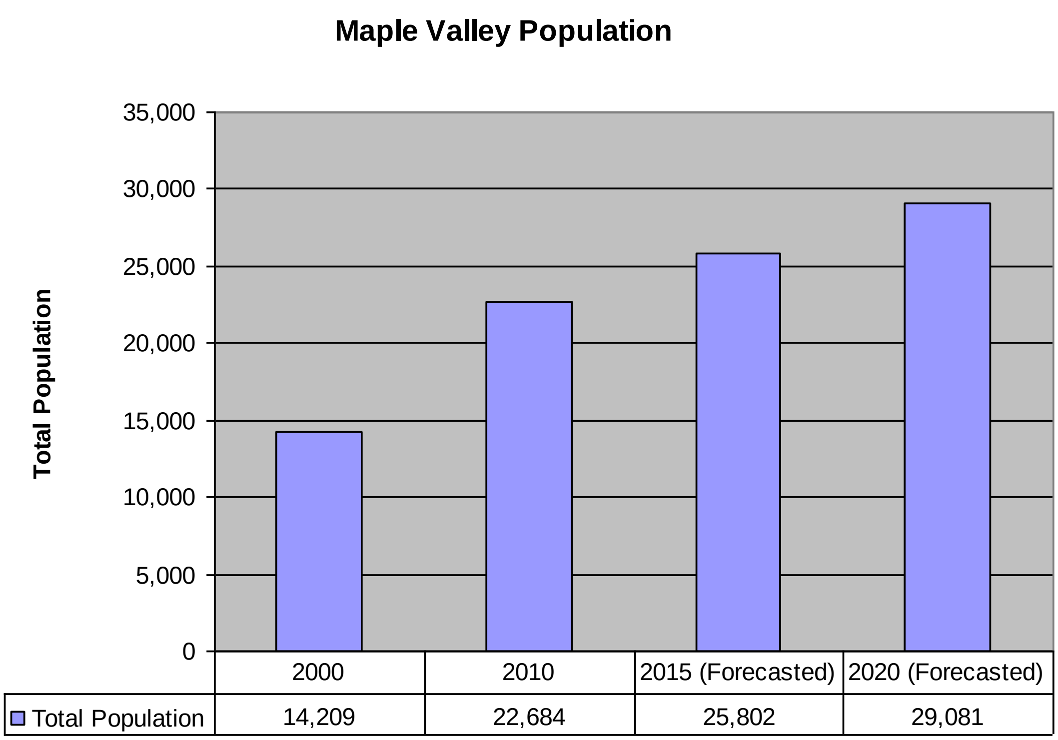
The U.S. Census Bureau provided a variety of useful information from the 2000 Census, the 2010 Census, and the 2005-2009 American Community Survey (ACS). Claritas provided a variety of current-year demographic and economic data. The National Center for Health Statistics provided vital statistics used for forecasting. To ensure maximum accuracy and consistency, official Census data was prioritized.

Additionally, Hebert Research conducted a survey of Maple Valley residents for another research project in October 2010. Some of that data is relevant to the current study of Maple Valley's demographic makeup and has been reproduced here.

Population Growth

The City of Maple Valley experienced large-scale population growth in the past decade. From 2000 to 2010, the population increased from 14,209 to 22,684, an increase of nearly sixty percent. This represents an average yearly growth rate of 4.8% per year. Population is forecasted to grow substantially to 25,802 in 2015 and 29,081 in 2020. The forecasted yearly growth rate is 2.5% per year. Growth is projected to be lower than it was in the recent past, as the rapid housing boom of the mid-2000s was likely anomalous and unsustainable.

This forecast accounts for net migration to Maple Valley as well as natural growth rates. Growth in households is projected using past housing permits data, excluding the housing bubble years of 2002-2006, resulting in an expected addition of 129.5 households per year. Based on Maple Valley's current average household size of 2.95, this represents an expected growth of 382 people per year from immigration alone. Expected birth rates were calculated using national vital statistics, adjusted to match the age and racial profile of Maple Valley. Similarly, expected death rates were calculated based on national statistics, adjusted for the age profile of Maple Valley residents. The expected annual birth rate is 11.7 per 1,000 people, while the expected annual death rate is 1.6 per 1,000 people. The natural growth rate for Maple Valley, based on births and deaths, is forecast at 10.1 per 1,000 people per year.



The population of Maple Valley is concentrated within a small area, and surrounding communities are extremely close. The number of people living within a 3-mile radius of Maple Valley City Hall is actually greater than the total number of people living within the boundaries of the City of Maple Valley. The entire area within a 7-mile radius of City Hall has displayed notable population growth since 2000, but growth has been greater in the areas nearer to City Hall, reaching as high as 41.8% within a 1-mile radius. Maple Valley itself has experienced much faster growth than the surrounding areas.

Population By Distance From City Hall					
	1-Mile	**3-Mile**	**5-Mile**	**7-Mile**	**Maple Valley City**
Population 2000	3,769	30,476	57,329	145,453	14,209
Population 2011	5,345	38,831	72,926	171,784	22,684*
% Growth Population	41.8%	27.4%	27.2%	18.1%	59.6%
Households 2000	1,298	10,288	19,347	50,148	4,809
Households 2011	1,876	13,357	24,944	59,703	7,679*
% Growth Households	44.5%	29.8%	28.9%	19.1%	59.7%

**Present population and households for Maple Valley City are reported directly from 2010 Census data. Population and households by distance are current year estimates from Nielsen Claritas.*

Areas within 5 miles of Maple Valley City Hall were forecast based on expected growth rates for Maple Valley City. The 7-mile radius was forecast using past growth rates for that area, due to the fact that the region inside a 7-mile radius of Maple Valley City Hall includes a large number of other communities. Population for the nearby region is forecast to increase by 24.9%. Significant growth is expected, but the growth rate is projected to be less than it was in the previous decade.

2020 Forecast Population By Distance From City Hall					
	1-Mile	**3-Mile**	**5-Mile**	**7-Mile**	**Maple Valley City**
Population	6,675	48,500	91,085	196,832	29,081
% Growth Population 2011-2020	24.9%	24.9%	24.9%	14.6%	28.2%*
Households	2,158	15,368	28,700	68,882	8,974
% Growth Households 2011-2020	15.1%	15.1%	15.1%	15.4%	16.9%*

**The reported percent growth for Maple Valley City is from 2010-2020.*

Geo-Demographic Segments

Nielsen Claritas publishes information on the distribution of geo-demographic market segments in communities. Market segments are defined by nine factors: age, income, children, homeownership, employment, education, urbanicity, income producing assets, and race. Six of those factors are reported below. For the remaining three factors, Maple Valley's urbanicity is "suburban", income producing assets largely correspond to income, and all segments are primarily white. The following table lists all segments that were represented by at least one percent of Maple Valley households. Collectively, the listed segments account for 92.0% of households in Maple Valley.

Geo-Demographic Segments

Segment	% of Households	Age Range	Median Income (U.S.)	Presence of Children	Homeownership	Employment Levels	Education Levels
Kids & Cul-de-sacs	19.7%	25-44	$76,379	Yes	Mostly Owners	Professional	College Grad
Winner's Circle	19.6%	35-54	$112,580	Yes	Mostly Owners	Management	Graduate Plus
Home Sweet Home	8.4%	<55	$72,029	No	Mostly Owners	Professional	College Grad
Movers & Shakers	8.2%	35-54	$109,351	No	Mostly Owners	Management	Graduate Plus
Blue Blood Estates	5.7%	45-64	$126,538	Yes	Mostly Owners	Management	Graduate Plus
Beltway Boomers	4.5%	45-64	$80,026	Yes	Mostly Owners	White Collar, Mix	College Grad
Upward Bound	4.4%	35-54	$88,455	Yes	Mostly Owners	Management	Graduate Plus
New Empty Nests	3.8%	65+	$75,295	No	Mostly Owners	Management	Graduate Plus
Brite Lites, Li'l City	3.2%	<55	$77,320	No	Mostly Owners	Management	Graduate Plus
Executive Suites	3.0%	<55	$78,008	No	Mostly Owners	Management	College Grad
Gray Power	2.9%	65+	$55,328	No	Mostly Owners	Mostly Retired	College Grad
Pools and Patios	2.8%	45-64	$76,099	No	Homeowners	Management	Graduate Plus
White Picket Fences	2.6%	25-44	$55,007	Yes	Mix, Owners	BC, Service, Mix	Some College
Upper Crust	1.9%	45-64	$121,186	No	Homeowners	Management	Graduate Plus
New Homesteaders	1.2%	25-44	$59,158	Yes	Mostly Owners	BC, Service, Mix	College Grad

Based on these segments, a clear portrait emerges of Maple Valley as a homogeneous community. The vast majority of households are upper-middle class or wealthier. Adult residents tend towards being middle-aged. Young adults are a minority, while children are very common. Most households own their homes. Maple Valley residents are mostly college graduates with successful careers.

While the market segments currently reported by Nielsen Claritas are statistically accurate, more useful classification systems could be created. An alternative, more applicable set of demographic segments would include:

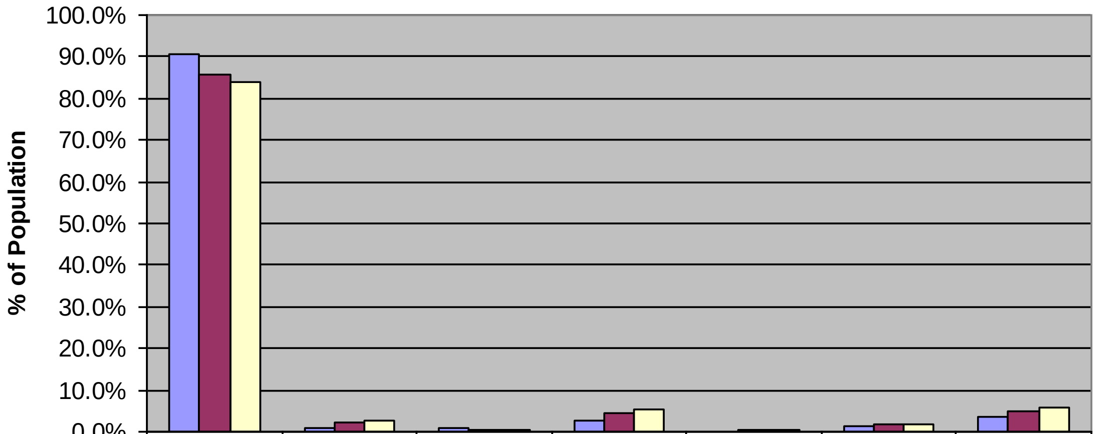
- Emerging Creative Class: This group includes college educated professionals under the age of 35. Members of the emerging creative class tend to have high incomes or be on track for high incomes as their careers develop.
- Creative Class Achievers: This group represents successful professionals in the prime of their careers, between the ages of 35 and 54. Members of this group are college educated, have professional or managerial jobs, may be business owners or sole proprietors, and lie in the top 25% for median income. Creative class achievers are mostly homeowners with families.
- Second Half of Careers: Members of this group are older (55+), but still productive and in the top quartile for median income. They are homeowners with professional or managerial careers. Generally, these households do not include children, as any offspring of this group's members would likely have already grown into adults in their own right.
- Working Class: This group represents less educated individuals, mostly within the service and retail industries. Their incomes tend to be below average, a fact that is true across age groups, since their professions offer little opportunity for long-term career advancement.
- Retired: Households consisting of retired individuals fall in the bottom 50% for income, but may have accumulated wealth. Members of this group generally do not have children at home, and usually own the houses they live in.

Under such a classification system, Maple Valley would be regarded as primarily a haven for Creative Class Achievers.

Ethnic Diversity

Maple Valley is a predominantly white community. However, diversity has trended upwards in the past decade. In 2000, 90.6% of Maple Valley residents were white. By 2010, that number decreased to 85.8%, as all minority groups except American Indians became more populous. The most common minority group is Asians, at 4.5% of the population as of the 2010 Census. Future changes in the ethnic makeup of Maple Valley residents are forecast based on household migration. Diversity is expected to continue to increase over the next decade.

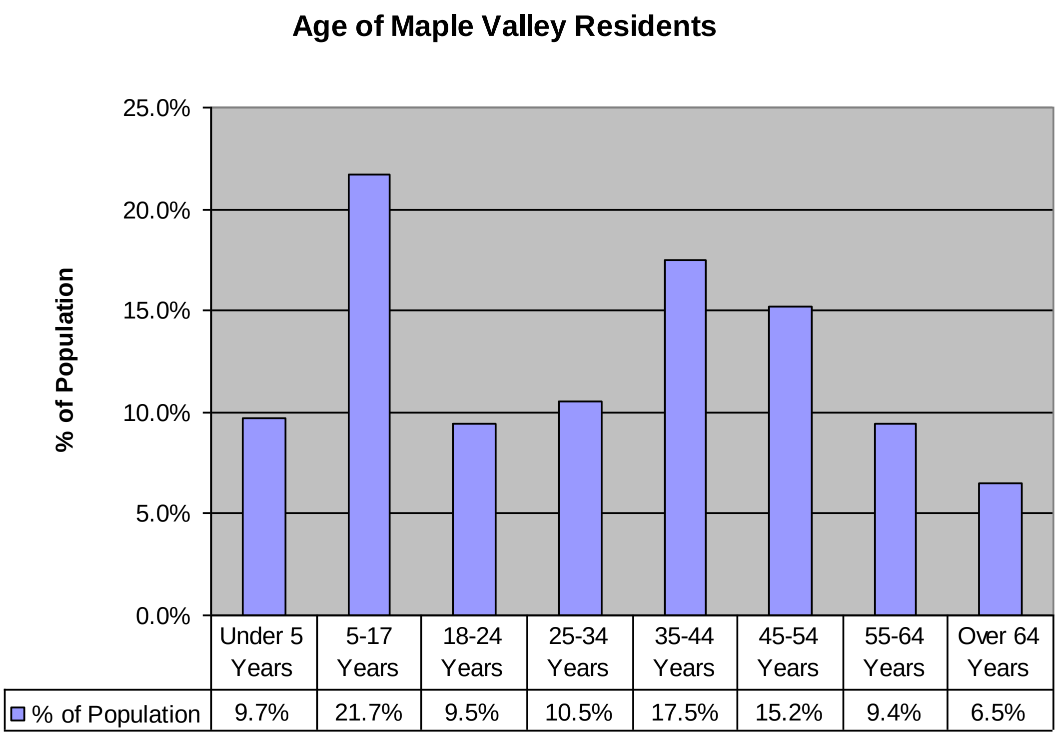
Ethnic Diversity



	White	Black or African American	American Indian and Alaska Native	Asian	Hawaiian and Other Pacific Islander	Some Other Race	Two or More Races
2000	90.6%	1.1%	0.7%	2.5%	0.2%	1.4%	3.6%
2010	85.8%	2.1%	0.5%	4.5%	0.4%	1.7%	5.0%
2020	83.8%	2.5%	0.4%	5.3%	0.5%	1.8%	5.6%

Age of Population

As of the current year, Maple Valley's population consists primarily of adults over 34 (48.6%) and children under 18 (31.4%), indicating that Maple Valley is largely populated by families. Younger adults aged 18 to 34 are a minority (20.0%).



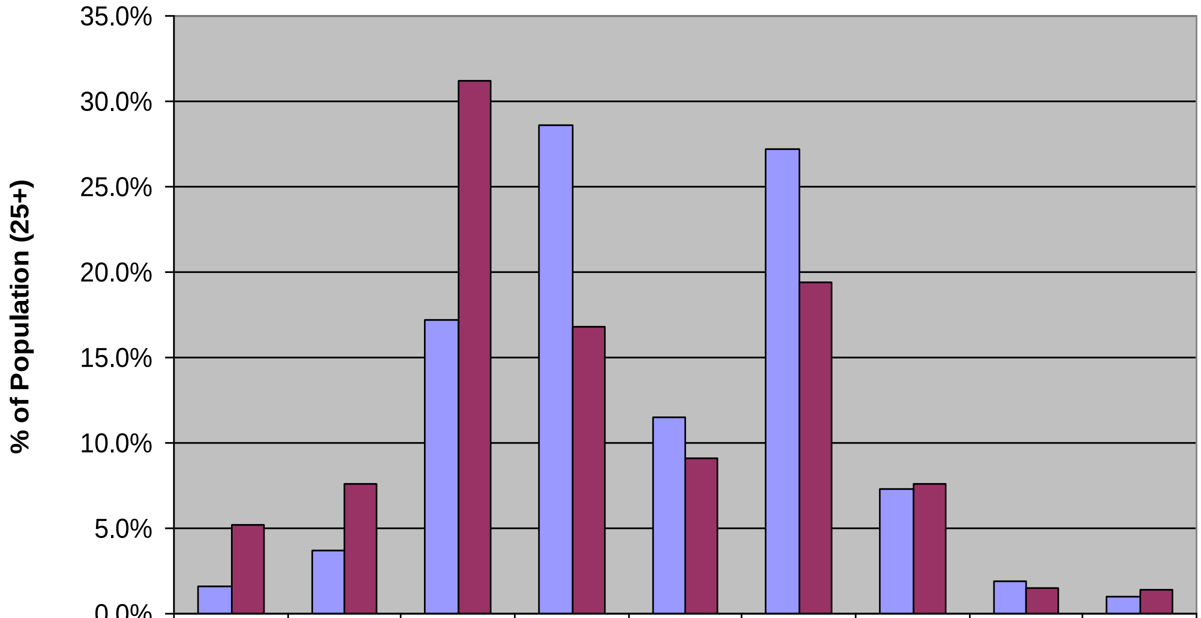
As of 2010, about half of all households contain at least one person under the age of 18. Households containing senior citizens are in the minority, but have grown considerably in recent years, reaching 14.4% of all households by 2010. This trend is projected to continue. For 2020, 46.4% of households are expected to include a minor, while 19.0% of households are expected to include a senior citizen.

Presence of Children and Senior Citizens						
	2000		2010		2020	
	Number	%	Number	%	Number	%
Households with individuals under 18 years	2,568	53.4%	3,835	49.9%	4,390	48.9%
Households with individuals 65 years and over	469	9.8%	1,109	14.4%	1,705	19.0%

Education

Maple Valley residents tend to be well educated. Among residents aged 25 and older, the vast majority (77.5%) have at least attended college. About half (48.9%) have achieved a collegiate degree. Compared to the general U.S. population, Maple Valley residents are far more likely to have attended and graduated from college. However, the presence of residents with post-bachelor's degrees in Maple Valley is similar to the nation at large.

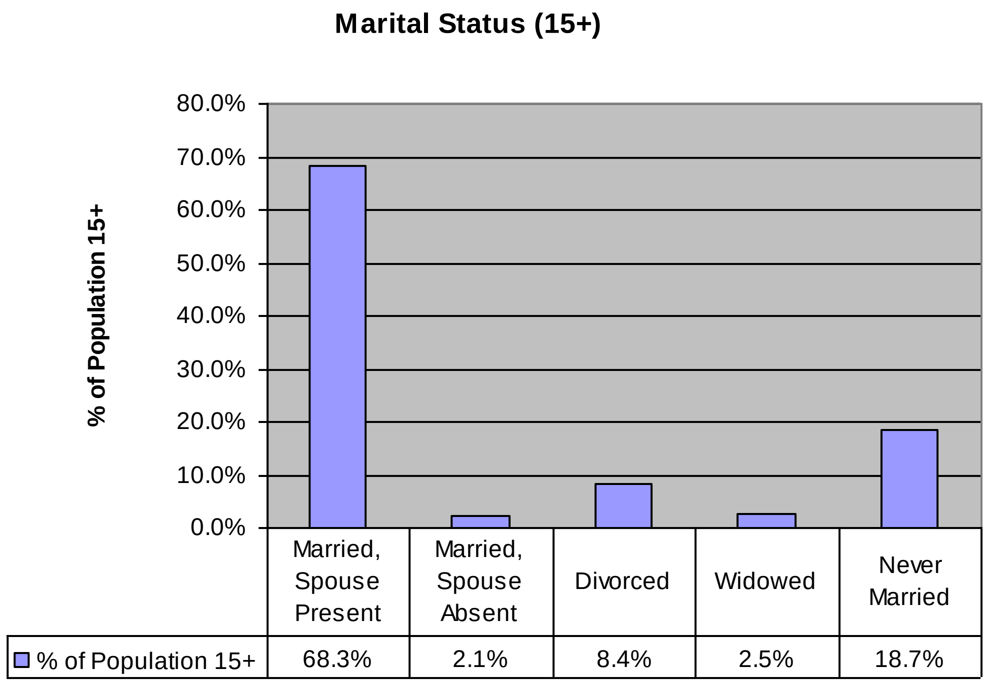
Highest Level of Education Achieved (25 Years And Older)



	Less Than Ninth Grade	Some High School, No Diploma	High School Graduate	Some College, No Degree	Associate's Degree	Bachelor's Degree	Master's Degree	Professional Degree	Doctorate Degree
Maple Valley	1.6%	3.7%	17.2%	28.6%	11.5%	27.2%	7.3%	1.9%	1.0%
U.S.	5.2%	7.6%	31.2%	16.8%	9.1%	19.4%	7.6%	1.5%	1.4%

Marital Status

The majority (70.4%) of Maple Valley residents aged 15 and over are currently married. Of this group, 97% currently live with their spouse. Only 18.7% of residents have never been married, while 8.4% are divorced and currently single and 2.5% are widowed and single. It should be noted that 5.3% of the population is between the ages of 15 and 17, and 3.9% of the population is between the ages of 18 and 20. It is likely that these groups are responsible for a large portion of the residents who have never married, suggesting that the rate of marriage among adult householders is even higher. Maple Valley is predominantly a settled, family community.



Retirement

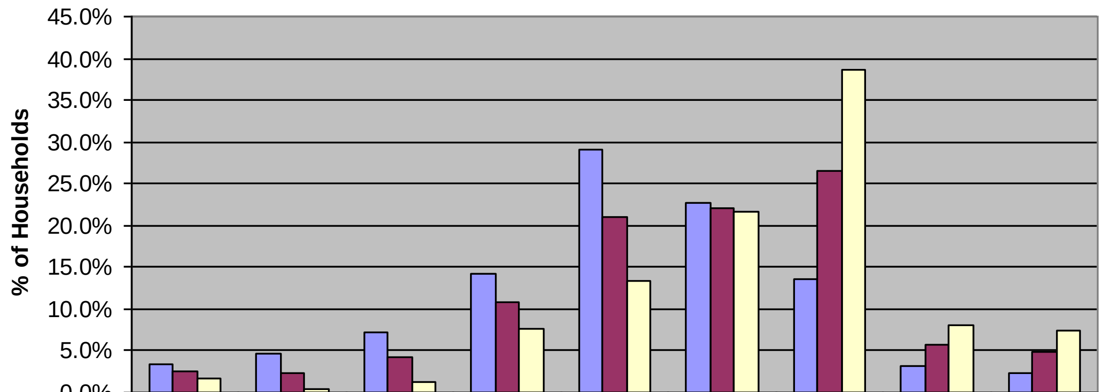
As of the 2009 American Community Survey, 17.2% of Maple Valley households receive social security and 16.1% of households receive retirement income. It should be noted that there is most likely a large amount of overlap between these groups. Overall, about one-sixth or greater of Maple Valley households contain a retired person. The proportion of houses containing retired people and social security recipients has increased since 2000. These groups are projected to continue to grow in the coming years. Currently, 24.6% of Maple Valley residents are between the ages of 45 and 64, and many of these will be approaching retirement age in the next ten years. Maple Valley residents tend to be settled homeowners, and thus are expected to remain in the community as they age, resulting in a large growth in the City's retired population.

Retirement and Social Security			
	2000	**2009**	**2020**
Households Receiving Social Security	583	1,264	2,100
% of Households Receiving Social Security	12.1%	17.2%	23.4%
Households With Retirement Income	1186	1,186	2,046
% of Households With Retirement Income	10.6%	16.1%	22.8%

Household Income

Maple Valley residents tend to be well-off. The median household income is $85,336 per year. This current level represents a 27.1% growth from 1999, when the median household income was $67,159 per year. Over that period, the percentage of households earning more than $100,000 per year rose dramatically, while all groups earning below $75,000 per year shrunk. However, Consumer Price Index data indicates a 36.2% increase in prices due to inflation from January 1999 to June 2011. Income growth has not kept pace with inflation. In real terms, Maple Valley has become less affluent, a symptom of the depth and intensity of the current recession. Based on the trend of the past decade, household income is forecast to rise considerably by 2020, to a projected median income of $102,147. Due to the unpredictability of inflation, it is unclear what this will mean in real terms.

Household Income



	Less than $15,000	$15,000 to $24,999	$25,000 to $34,999	$35,000 to $49,999	$50,000 to $74,999	$75,000 to $99,999	$100,000 to $149,999	$150,000 to $199,999	$200,000 or more
1999	3.3%	4.6%	7.3%	14.2%	29.0%	22.7%	13.5%	3.1%	2.3%
2011	2.5%	2.4%	4.2%	10.8%	21.0%	22.2%	26.4%	5.7%	4.9%
2020	1.7%	0.4%	1.3%	7.6%	13.4%	21.7%	38.6%	8.1%	7.3%

Housing

The size of Maple Valley households has remained consistent across time. In both 2000 and 2010, the average household contained 2.95 people. The average size of family households was 3.26 in 2000 and 3.30 in 2010. The percentage of households that contained families was 82.2% in 2000 and 80.2% in 2010. The average household size is forecast to increase to 3.24 in 2020 due to the fact that the birth rate is much higher than the death rate.

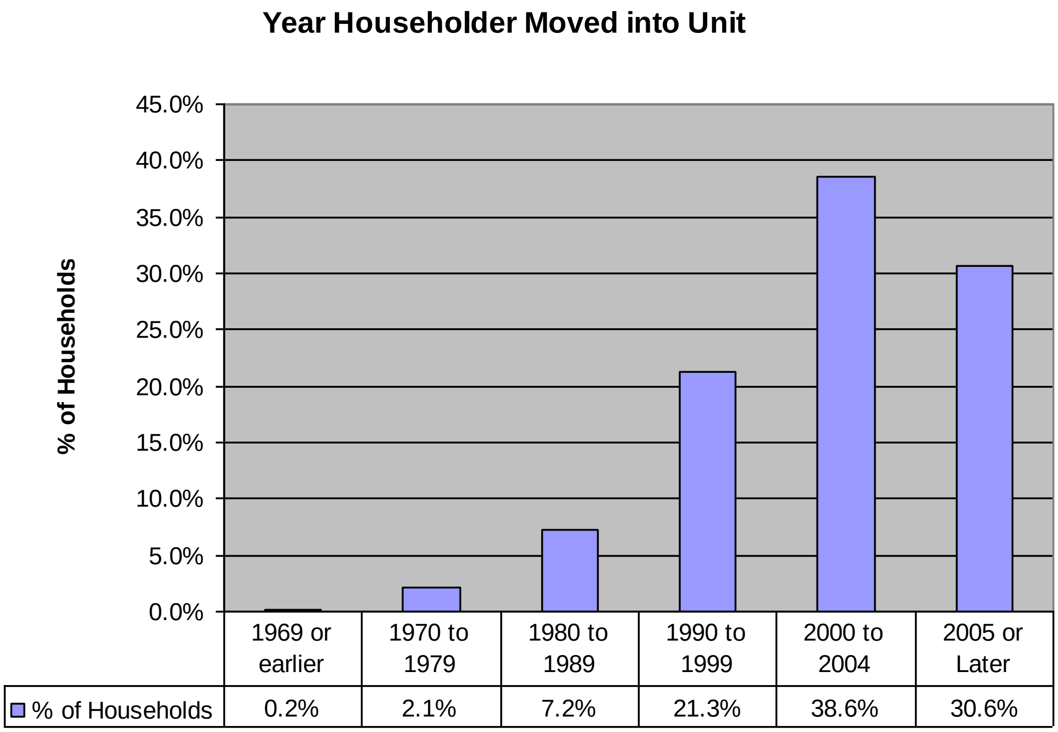
Size of Households			
	2000	**2010**	**2020**
Average Household Size	2.95	2.95	3.24
Average Family Household Size	3.26	3.30	3.68
% Family Households	82.2%	80.2%	79.6%

Housing units in Maple Valley are mostly owner-occupied. Currently, 84.7% of houses are occupied by their owners, compared to a national average of 66.9% and a King County average of 60.8%. The large number of owner-occupied households indicates a relatively settled population, suggesting that recent increases in population are likely permanent. Housing figures have increased by over half (59.7%) since 2000, with significant growth in both owner-occupied and renter-occupied housing. Based on recent trends in new housing permits, the number of occupied housing units is forecast to increase to 8,974 in 2020.

Housing Statistics			
	2000	**2010**	**2020**
Occupied Housing Units	4,809	7,679	8,974
Owner-Occupied Housing Units	4,187	6,507	7,538
% Owner-Occupied	87.1%	84.7%	84.0%
Renter-Occupied Housing Units	622	1,172	1,436
% Renter-Occupied	12.9%	15.3%	16.0%

Housing Growth		
	2000-2010	**2010-2020**
% Growth Occupied Housing Units	59.7%	16.9%
% Growth Owner-Occupied	55.4%	15.8%
% Growth Renter-Occupied	88.4%	22.5%

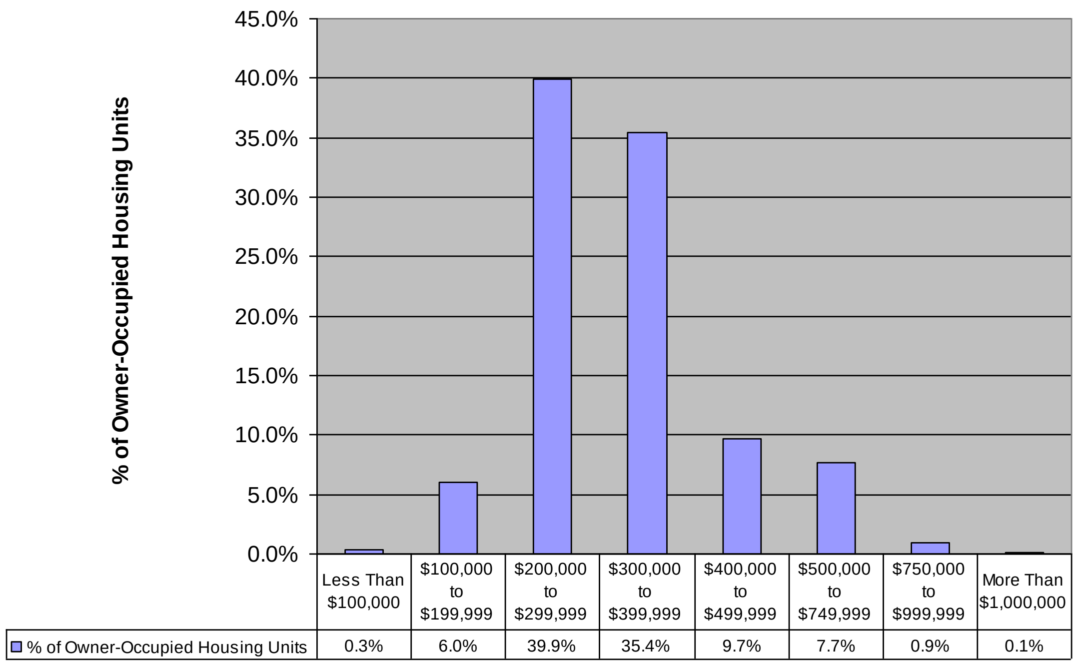
Residents tend to have moved into their current homes very recently: 30.6% of householders moved into their current residence in 2005 or later, while over two-thirds (69.2%) moved in within the past decade.



Housing Values

The values of the 6,507 owner-occupied housing units are concentrated in the $200,000 to $400,000 range, as 39.9% fall between $200,000 and $299,999 and 35.4% are between $300,000 and $399,999. Owner-occupied housing units valued less than $100,000 account for only 0.3%, while, at the higher ends, 0.9% are valued between $500,000 and $999,999 and only 0.1% have values greater than a million dollars. The median value is $310,842 and the mean is $337,071. Due to the tremendous instability of the nationwide housing market, it is not possible to generate a useful 10-year forecast for Maple Valley housing values.

Value of Owner-Occupied Housing Units



Employment

About three-quarters (75.2%) of Maple Valley residents 16 and older are in the labor force. Among these, employment is very high (96.8%).

Employment (16 and Older)	
In Labor Force	75.2%
Not in Labor Force	24.8%
Employment Rate	96.8%
Unemployment Rate	3.2%

Employment differs dramatically by gender. The male labor force participation rate is 81.5%, while the female labor force participation rate is a much lower 65.0%. This large difference intuitively corresponds to Maple Valley's large proportion of family households. For those in the labor force, the employment rate is high for both genders.

Employment By Gender (16 and Older)		
	Male	Female
Labor Force Participation Rate	81.5%	65.0%
Employment Rate	97.6%	95.9%

The labor force participation rate appears to be heavily influenced by child-rearing strategies. Among families with children under the age of six, 43.7% have at least one of the parents outside of the labor force. By comparison, in families with children aged six to 17, only 27.0% have a parent outside of the labor force. This substantial difference likely reflects an intentional, planned approach to raising children. Maple Valley residents can be expected to adjust their labor force participation based on the age and needs of their children.

Family Employment	
All parents in family are in labor force (with children under 6 years)	56.3%
All parents in family are in labor force (with children under 17 years)	73.0%

Employment Demographics

Maple Valley residents tend to be professional or white-collar workers. The largest group (45.3%) works in management and professional occupations, and a further 26.8% work in sales and office occupations. Service occupations account for 11.6% of the population. An additional 8.2% of the population work in construction and related occupations, 7.9% work in production and transportation occupations, and the remaining 0.3% work in farming, fishing, and forestry.

Occupation (Civilian Employed Population 16 Years and Over)	
Management, professional, and related occupations	45.3%
Sales and office occupations	26.8%
Service occupations	11.5%
Construction, extraction, maintenance, and repair occupations	8.2%
Production, transportation, and material moving occupations	7.9%
Farming, fishing, and forestry occupations	0.3%

In October 2010, Hebert Research conducted primary research of Maple Valley residents, providing relevant firsthand information on employment demographics. The remainder of this section reports the findings of that research. According to that research, more than half of respondents (53.1%) work outside of the City of Maple Valley. Additionally, 18.1% of respondents work in the City of Maple Valley and 28.8% do not work.

Work Location	
Response	**Percentage**
In the City of Maple Valley	18.1%
Outside the City of Maple Valley	53.1%
Do not Work	28.8%

Multivariate Analysis

Females are significantly less likely to work outside the City of Maple Valley than men. Additionally, women are significantly less likely to work. (*$p < 0.001$, Cramer's $V = 0.320$*).

Employment	Male	Female
In the City of Maple Valley	16.1%	20.0%
Outside the City of Maple Valley	68.4%	38.5%
Do not currently work	15.5%	41.5%

Where Respondents Work

The highest frequency of respondents who work outside the City of Maple Valley work in Seattle (20.6%). The following table shows the areas where respondents work:

Where Respondents Work	
City	**Percentage**
Seattle	20.6%
Renton	12.9%
Kent	10.8%
Bellevue	8.8%
Tukwila	6.7%
Auburn	4.7%
Redmond	4.1%
Issaquah	2.6%
Covington	2.1%
Other	26.7%

The following table reports which industries the respondents work for. The industries with the highest frequency of respondents are professional services (31.3%) and technology (22.1%).

Industry Worked For	
Industry	**Percentage**
Professional Services	31.3%
Technology	22.1%
Retail	11.6%
Commercial Builders	8.9%
Medical	7.9%
Real Estate	3.4%
Hospitality	2.7%
Other	12.1%

Industries in the "other" category include the following:

- Aerospace
- Government
- Logistics
- Manufacturing

The following are a selection of the companies or organizations respondents work for:

- Bank of America
- Bill and Melinda Gates Foundation
- Boeing
- Children's Hospital
- Costco
- DSHS
- FedEx
- Graham Trucking
- H&R Block
- Kent School District
- Microsoft
- Philips Healthcare
- Qwest
- RE/MAX
- Renton School District
- T-Mobile
- Tahoma School District
- UPS
- Windermere

Additionally, for those respondents that work, 28.6% are a sole proprietorship.

Sole Proprietorship	
Response	**Percentage**
Yes	28.6%
No	71.4%

On average, respondents commute 30.2 miles round trip to work. Nearly one quarter of respondents (24.8%) commute between 31 and 50 miles and 14.3% commute 51 or more miles each day. Approximately one out of five respondents (19.6%) commute less than five miles each day. Overall, it is evident that respondents make long commutes to and from Maple Valley for work.

Length of Commute in Miles	
Miles	**Percentage**
0 to 5	19.6%
5 to 10	8.8%
11 to 20	15.8%
20 to 30	16.7%
31 to 50	24.8%
51 or More	14.3%
Mean	**30.2**
Std. Deviation	**28.7**
Kurtosis	**10.7**

Respondents reported that they primarily shop in either Covington (42.8%) or Maple Valley (37.3%). The remaining cities were named by a relatively low frequency of respondents.

Primary Shopping Area	
City	**Percentage**
Covington	42.8%
Maple Valley	37.3%
Issaquah	5.1%
Kent	4.6%
Tukwila	2.8%
Other	2.8%
Renton	2.1%
Auburn	1.4%
Bellevue	0.9%
Seattle	0.2%

Economic Leakage

Current year retail expenditures by Maple Valley residents far outweigh the level of retail sales that actually occur within Maple Valley. Retail expenditures total $377,866,671, while retail sales are only $117,340,875, creating a deficit of $260,525,796. The fact that Maple Valley displays a retail deficit is to be expected, as the city is still mostly a residential community. However, Maple Valley's ratio of expenditures to sales is higher than for the nearby region. This represents a considerable leakage of revenue to surrounding communities. It also represents a significant opportunity for the city to increase its tax income — Maple Valley residents spend heavily, at an average of $49,208 on retail goods and services per household per year. This is a huge source of revenue which is not fully captured by the city.

The following table compares Maple Valley's retail activity to areas which contain primary centers of population and commerce within seven miles of Maple Valley City Hall. The largest beneficiary of Maple Valley's economic leakage is likely the zip code 98042, which has by far the lowest expenditures to sales ratio in the region. Zip code 98042 includes the City of Covington, a large hub of retail activity that was listed as the primary shopping area by 42.8% of Maple Valley residents.

Retail Supply and Demand				
	Supply (Retail Sales)	Demand (Retail Expenditures)	Leakage	Expenditures to Sales Ratio
Maple Valley	$117,340,875	$377,866,671	-$260,525,796	-3.22
98038 (Non-Maple Valley)	$50,383,095	$185,566,094	-$135,182,999	-3.68
98010	$35,740,867	$82,631,601	-$46,890,734	-2.31
98042	$432,430,244	$789,417,042	-$356,986,798	-1.83
98058	$183,460,648	$728,056,773	-$544,596,125	-3.97
Region	$819,355,729	$2,163,538,181	-$1,344,182,452	-2.64

One large source of economic leakage that may be excluded is vehicle sales, which are a special case of retail activity. Vehicle sales are responsible for $64,415,241 of Maple Valley's yearly economic deficit. When these are excluded, Maple Valley's expenditures to sales ratio drops to -2.69.

Retail Supply and Demand				
	Supply (Retail Sales)	Demand (Retail Expenditures)	Leakage	Expenditures to Sales Ratio
Maple Valley (Vehicle Sales Excluded)	$116,366,410	$312,476,965	-$196,110,555	-2.69

Outside of vehicles, the largest source of economic leakage is caused by general merchandise stores such as Target and Wal-Mart. The deficit in this category can be traced to the City of Covington and zip code 98042, which takes in $153,315,965 per year from general merchandise stores and has a retail surplus of $52,567,478 in the category. Other major areas of economic leakage include grocery stores, building materials dealers, clothing stores, drug stores, and food services. Maple Valley displays a retail deficit for nearly every type of store. Only four categories show a surplus, and hardware stores are the only category with a surplus of over $1,000,000.

Retail Supply and Demand, by Type of Store			
Type of Retail Store	**Supply (Retail Sales)**	**Demand (Retail Expenditures)**	**Surplus/Deficit**
Furniture Stores	$0	$4,498,498	-$4,498,498
Home Furnishing Stores	$247,713	$3,724,885	-$3,477,172
Household Appliances Stores	$0	$1,559,606	-$1,559,606
Radio, TVs, and Electronics Stores	$692,398	$4,988,936	-$4,296,538
Camera and Photographic Equipment Stores	$0	$1,855,147	-$1,855,147
Computer and Software Stores	$462,864	$433,391	$29,473
Home Centers	$10,721,535	$13,251,652	-$2,530,117
Paint and Wallpaper Stores	$1,164,333	$819,573	$344,760
Hardware Stores	$9,796,795	$3,247,740	$6,549,055
Other Building Materials Dealers	$3,085,202	$15,854,526	-$12,769,324
Nursery and Garden Centers	$508,910	$2,789,475	-$2,280,565
Supermarkets and Grocery Stores	$19,160,275	$41,115,303	-$21,955,028
Convenience Stores	$66,602	$2,062,725	-$1,996,123
Specialty Food Stores	$162,082	$1,389,434	-$1,227,352
Beer, Wine, and Liquor Stores	$2,149,465	$2,859,814	-$710,349
Pharmacies and Drug Stores	$4,661,521	$14,828,134	-$10,166,613
Cosmetics and Beauty Supply Stores	$459,876	$600,733	-$140,857
Optical Goods Stores	$0	$840,075	-$840,075
Other Health and Personal Care Stores	$518,642	$1,113,026	-$594,384
Clothing Stores	$728,714	$13,095,318	-$12,366,604
Shoe Stores	$0	$2,412,693	-$2,412,693
Jewelry Stores	$0	$2,611,495	-$2,611,495
Sporting Goods, Hobby, Book, Music Stores	$1,403,722	$8,119,497	-$6,715,775
General Merchandise Stores	$6,038,747	$48,792,143	-$42,753,396
Florists	$101,046	$775,372	-$674,326
Office Supplies, Stationery, and Gift Stores	$592,631	$4,072,466	-$3,479,835
Used Merchandise Stores	$1,825,644	$895,241	$930,403
Other Miscellaneous Store Retailers	$813,226	$3,967,866	-$3,154,640
Full-Service Restaurants	$11,001,265	$18,316,615	-$7,315,350
Limited Service Eating Places	$7,543,293	$17,088,752	-$9,545,459
Special Foodservices	$3,082,415	$3,354,191	-$271,776
Bars	$1,472,945	$1,720,490	-$247,545

Maple Valley shows a retail deficit for nearly every category of product. As noted previously, vehicles are the single largest source of economic leakage. After vehicles, the largest deficits appear in groceries, clothing, drugs & cosmetics, and meals.

Retail Supply and Demand, by Type of Product			
Type of Product	**Supply (Retail Sales)**	**Demand (Retail Expenditures)**	**Surplus/Deficit**
Groceries	$24,588,120	$63,059,672	-$38,471,552
Meals & Snacks	$18,333,013	$33,409,261	-$15,076,248
Automotive Fuels & Lubricants	$16,329,137	$26,155,173	-$9,826,036
Furniture & Home Furnishings	$7,998,055	$23,091,521	-$15,093,466
Drugs & Cosmetics	$7,244,599	$27,623,379	-$20,378,780
Alcholic Beverages	$6,601,344	$10,893,325	-$4,291,981
Smoking Products	$4,473,770	$7,667,928	-$3,194,158
Lawn, Garden, and Farm Equipment & Supplies	$3,106,945	$4,608,025	-$1,501,080
Clothing	$2,861,228	$31,712,087	-$28,850,859
Pets & Pet Supplies	$1,837,470	$3,424,192	-$1,586,722
Sporting Goods	$1,436,972	$5,050,643	-$3,613,671
Audio Equipment & Musical Instruments	$1,295,818	$3,954,514	-$2,658,696
Major Household Appliances	$1,215,862	$2,754,968	-$1,539,106
Toys, Hobby Goods & Games	$1,154,296	$5,466,235	-$4,311,939
Computer Products	$1,027,821	$6,924,445	-$5,896,624
Vehicles	$974,465	$65,389,706	-$64,415,241
Paper & Related Products	$899,796	$3,267,348	-$2,367,552
Hardware, Tools, Plumbing, Electrical	$843,024	$2,511,358	-$1,668,334
Paint & Sundries	$786,745	$786,706	$39
Household Cleaning Products	$717,443	$818,268	-$100,825
Small Electric Appliances	$651,602	$665,016	-$13,414
Books	$650,947	$5,275,238	-$4,624,291
RVs, Campers, Camping & Travel Trailers	$594,243	$2,659,779	-$2,065,536
Televisions, VCRs, Video Cameras	$552,208	$2,956,644	-$2,404,436
Shoes	$454,372	$5,548,457	-$5,094,085
Lumber & Building Materials	$377,884	$1,610,014	-$1,232,130
Jewelry	$341,923	$6,066,327	-$5,724,404
Optical Goods	$86,474	$1,509,496	-$1,423,022
Photographic Equipment & Supplies	$79,187	$995,517	-$916,330

The following table lists all store categories that show a retail surplus in Maple Valley's primary trade area. These areas are recipients of economic leakage. General merchandise stores in zip code 98042 have the largest surplus at $52,567,478, followed by pharmacies and drug stores in 98042 and full-service restaurants in 98010, at $4,909,239 and $1,125,809 respectively.

Regional Areas of Surplus		
Zip Code	**Type of Retail Store**	**Surplus**
98010	Full-Service Restaurants	$1,125,809
98010	Beer, Wine, and Liquor Stores	$290,761
98010	Computer and Software Stores	$82,356
98042	General Merchandise Stores	$52,567,478
98042	Pharmacies and Drug Stores	$4,909,239
98042	Computer and Software Stores	$417,850
98051	Sporting Goods, Hobby, Book, Music Stores	$308,950
98058	Special Foodservices	$24,163

Key Findings

1. Maple Valley has experienced rapid, transformative growth in population and housing in recent years. Large-scale growth is expected to continue over the next decade, but at a rate slower than what occurred over the previous decade.

2. In terms of market segments, Maple Valley is a homogeneous community. Its adult residents tend to be middle-aged, professional, upscale, well educated homeowners.

3. Maple Valley is not an ethnically diverse community. The vast majority of residents are white. However, recent years have shown a trend toward greater diversity. Diversity is forecast to increase slightly by 2020.

4. The population of Maple Valley consists largely of families. The majority of adults are currently married, and about half of households include children. Adults tend to be in their thirties or older, and young adults are a minority.

5. Residents of Maple Valley are more educated than the general U.S. population. Maple Valley contains a much higher proportion of college-educated adults, although graduate degrees are not especially common.

6. Maple Valley households tend to be well off, with a median income of $85,336 per year. The median dollar income of Maple Valley residents has increased significantly in the past decade. However, due to inflation, Maple Valley residents have actually become slightly less affluent in real terms. Nominal household income is forecast to continue to increase over the coming decade.

7. Households receiving social security or retirement income are a minority, but represent a growing segment of the population.

8. The vast majority of Maple Valley residents own the homes they live in. The majority moved into their current residence within the past ten years, as the City rapidly grew in population.

9. Owner-occupied housing units in Maple Valley are generally neither extremely inexpensive nor extremely expensive. About three-quarters have values in the range of $200,000 to $400,000.

10. Among those in the labor force, employment rates in Maple Valley are very high. Women are far more likely than men to not participate in the labor force. It is common for families with small children to have one or more parents outside of the labor force, indicating that the presence of children has a large effect on labor force participation.

11. Maple Valley residents tend to work in professional and office occupations, as befits their advanced education. Most work outside of Maple Valley, and long commutes are common.

12. Maple Valley has a yearly retail sales deficit of $260,252,796. The largest sources of this economic leakage are vehicle sales, general merchandise stores, food, and food services. The most direct beneficiary of Maple Valley's retail economic leakage is the City of Covington, which is the primary retail shopping area for 42.8% of Maple Valley residents.